

Script 23 Pre-retirement preparation

Get ahead of the game! Avoid delays.

The most common reason that calculations of benefits or withdrawal settlements are delayed by the Fund is because of incorrect information or a lack of information. You can do something about this.

Every year you receive from your employer or you can find an Annual Pension Statement from the Fund in your Member Self-Service account (See Whiteboard Number 14). Look closely at this Statement because it tells you what information the Fund has about you.

What is your full name, check the spelling, make sure it is the correct transliteration that you use on your official documents, your date of birth, the Fund uses the Day- Month-Year standard, make sure your birthday is correct and the Day and Month are in the right order, Confirm your marital status.

If the information is incorrect please contact your human resources office and see that they correct it. Until you retire, all of the information in the Fund's system comes from your employer.

It is essential that you also check with your finance/payroll section to ensure that you do NOT have any outstanding debts with your employer. If you have worked for years, in order for your employer to finalize your separation they will look at your entire career to see that you are not owed anything and do not owe anything to the organization. This could include equipment, an education grant, an annual leave balance, a sabbatical, even library books; so you want to



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make sure that nothing is outstanding. Finance/payroll issues are the leading cause of delays.

During your last days of work you could also check with your Human Resource office and ask them to send your final time sheet to payroll as soon as possible, because your final accounts will not be completed until they have this on hand.

For more information on leaving your job see Whiteboard number 10.